



Member Services Division, P.O. Box 4000, Sacramento, CA 95812-4000
(888) CalPERS (225-7377) • Telecommunications Device for the Deaf - (916) 795-3240

Steps for Requesting Additional Retirement Service Credit (ARSC)

Complete Part 1

Add your name, Social Security number, former name (if applicable), employer, work phone, home phone, and mailing address.

Complete Part 2

A copy of your completed online service credit purchase estimate calculation must be attached for this to be considered a complete request. Refer to our Web site for the appropriate calculation program. If a copy is not attached, please explain why not.

Based on the online service credit purchase estimate attached to your request, indicate the years of Additional Retirement Service Credit you intend to purchase. Only one box can be checked.

Answer the remaining questions by checking the appropriate boxes and providing any additional information requested, if necessary.

Complete Part 3

The following is provided to make you aware of an employment certification you will be asked to complete in the ARSC cost election packet if you submit this credit request and are eligible for the purchase. CalPERS initially understood that this service credit option was not based on actual employment. Although federal law does not require that this service credit be based on actual employment, it does associate service credit with employment if the service is being purchased with after-tax funds and some pre-tax funds. In the absence of federal regulatory requirements, CalPERS is taking a reasonable approach to the certificate of employment requested. Employment certification will be required for any portion of the cost paid through:

- After-tax funds
- Installment payments
- In-service, plan-to-plan transfers of pre-tax assets from 403(b) and governmental 457 plans

A member may self-certify this corresponding service for any compensated employment that has not been credited/received under the CalPERS plan, including private sector employment, self-employment, or government, military, and school employment. While you are not required to include documentation of this employment with your election, should federal guidance be issued in the future, documentation may then be required.

This service may be computed under two methods. The elapsed time method allows a member who works reasonably steady time to receive credit based on the first date of employment regardless of the number of hours worked (i.e., a person who worked 4 hours a week for 3 years could certify 3 years of service). An hourly method may be used when a person worked a minimum number of hours (i.e., 500 hours equals a year).

Members may use whichever method works best for their service or combine the two methods for a total figure based on different periods of employment. For example, if you had steady employment from January 1985 thru June 1989, you could certify 4.600 years. If you also had 320 hours of part-time employment in 1983 and 600 hours in 1984, you would have an additional 1.640 years. (1983: $320/500=0.640$; 1984: $600/500=1.000$ which is the maximum credit in one year). Your combined total employment would be 6.240 years. The employment certification can be completed for the maximum 5.000 years.



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Request for Service Credit Cost Information Additional Retirement Service Credit (ARSC)

(Air Time or Non Qualified Service)

Part 1: Member Information

| | | | |
|-----------------------------|------|------------------------|----------|
| Name | | Social Security Number | |
| Former Name (if applicable) | | Current Employer | |
| () | | () | |
| Work Phone | | Home Phone | |
| Mailing Address | City | State | ZIP Code |

Part 2: Documentation of Service

☐ I have attached a copy of the estimate to purchase service credit. If not, indicate why: _____

Based upon the attached service credit purchase estimate, how many years of ARSC do you intend to purchase? (check one box only) A separate election document with detailed payment options will be mailed to you once this form has been processed.

☐ 1 year ☐ 2 years ☐ 3 years ☐ 4 years ☐ 5 years

Have you requested this cost information before? ☐ Yes ☐ No If yes, enter date request was submitted ____/____/____

Have you submitted a retirement application? ☐ Yes ☐ No If yes, enter retirement date ____/____/____

Do you anticipate purchasing this credit with a rollover or plan-to-plan transfer of pre-tax funds? ☐ Yes ☐ No

Part 3: Certification

I hereby certify that the above information is true and correct.

Signature _____ Date ____/____/____

Sign and date this request form, make a copy of your request for your records, and attach a copy of your online service credit purchase estimate.

Mail all materials to CalPERS Member Services Division, P.O. Box 4000, Sacramento, CA 95812-4000.